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PURCHASING USER MANUAL

CREATING PURCHASE ORDER NOTES

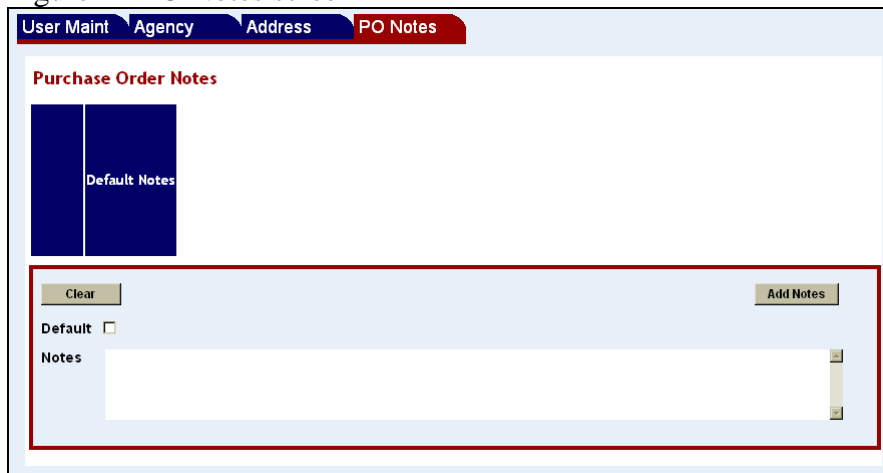
INTRODUCTION

An administrator can create notes or messages that purchasers can select from and append to a purchase order. The administrator can set any number of the notes as default notes which will automatically print on every purchase order.

TO CREATE PURCHASE ORDER NOTES

1. On the Administration screen, click the **PO Notes** tab.

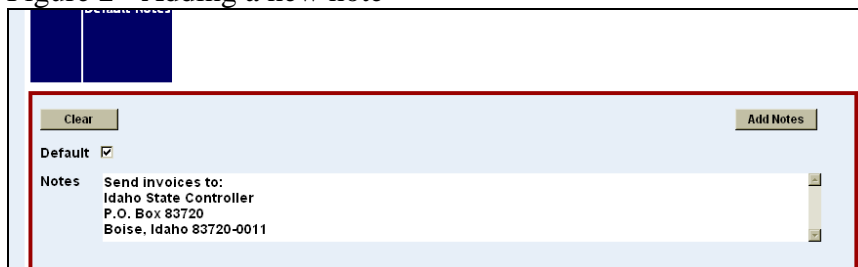
Figure 1 - PO Notes screen



The screenshot shows the 'Purchase Order Notes' screen. At the top, there are tabs: 'User Maint', 'Agency', 'Address', and 'PO Notes'. Below the tabs, the title 'Purchase Order Notes' is displayed. On the left, there is a blue button labeled 'Default Notes'. Below this, there is a form area with a 'Clear' button, a 'Default' checkbox, and a 'Notes' text area. An 'Add Notes' button is located on the right side of the form area.

2. In the **Notes** field, type the message you want to appear on a purchase order. Press ENTER to add separate lines, e.g., as in an address.

Figure 2 - Adding a new note



The screenshot shows the 'Purchase Order Notes' screen with the 'Notes' field filled with the text: 'Send invoices to: Idaho State Controller, P.O. Box 83720, Boise, Idaho 83720-0011'. The 'Default' checkbox is checked. The 'Clear' and 'Add Notes' buttons are visible.

3. Check the **Default** check box to make the note a default which will print automatically on every purchase order. (You can have as many default notes as needed.)
4. Click **Add Notes**.

Figure 3 - New note added

The screenshot shows the 'Purchase Order Notes' form. At the top, there are tabs: 'User Maint', 'Agency', 'Address', and 'PO Notes'. Below the tabs, the title 'Purchase Order Notes' is displayed. A blue box labeled 'Default Notes' is visible. Below this, there is a 'Select' dropdown menu with the text 'Send invoices to: Idaho State Controller P.O. Box 83720 Boise, Idaho 83720-0011'. Below the dropdown, there is a 'Clear' button and an 'Update Notes' button. A 'Default' checkbox is also present. The 'Notes' field contains the text 'Send invoices to: Idaho State Controller P.O. Box 83720 Boise, Idaho 83720-0011'. The entire form is enclosed in a red border.

5. To add another note, click **Clear**.
6. In the **Notes** field, type the message you want to appear on a purchase order.
7. Check the **Default** check box to make the note a default which will print automatically on every purchase order.
8. Click **Add Notes**.

Figure 4 - Second note added

The screenshot shows the 'Purchase Order Notes' form. At the top, there are tabs: 'User Maint', 'Agency', 'Address', and 'PO Notes'. Below the tabs, the title 'Purchase Order Notes' is displayed. A blue box labeled 'Default Notes' is visible. Below this, there are two 'Select' dropdown menus. The first dropdown has the text 'Please refer to State Purchasing Contracts'. The second dropdown has the text 'Send invoices to: Idaho State Controller P.O. Box 83720 Boise, Idaho 83720-0011'. Below the dropdowns, there is a 'Clear' button and an 'Update Notes' button. A 'Default' checkbox is also present. The 'Notes' field contains the text 'Please refer to State Purchasing Contracts'. The entire form is enclosed in a red border.

9. To edit a note, click **Select** next to the note.
10. Edit the **Notes** text and then click **Update Notes**.